Welcome to Docu-MART User Assistance

Docu-MART (Document - Management Authoring Review and Tracking System) provides a variety of user-assistance and help functions. This Online Help features screen-level assistance, screen element information, and supporting help for each procedure.

Information in Docu-MART Help can be accessed using the Contents, Index, or Search buttons at the top, left side of this screen.

- By default, the table of **Contents** is displayed in the panel to the left of this screen. Click a book icon to expand it and display the topics it contains. Click the topic you want displayed in this space.
- Using the **Index** allows you to type a keyword to narrow the list of topics displayed to those containing that keyword.
- Using the **Search** functionality, you can type a keyword to display a list of topics that contain that keyword of keywords. For example, after entering **Reviewers** and clicking **Go**, all topics containing the term Reviewers display.

If you encounter problems working with Docu-MART, please contact the NCI CTEP Help Desk for a quick resolution.

To contact the NCI CTEP Help Desk:

- Email at ncictephelp@ctep.nci.nih.gov.

Release Notes

View-only information about each Docu-MART release is available in note form. Click on the link to open the Release Notes.

Version 1 Release 11.2 Notes 06/13/2008

Version 1 Release 11.3 Notes 04/14/2008

Version 1 Release 11.1 Notes 03/10/2008

Note: Release 11.1 changes are scheduled to be implemented in late June 2008.

Version 1 Release 11 Notes 01/24/2008

Version 1 Release 10 Notes 10/15/2007

Version 1 Release 9.2 Notes 09/14/2007

Version 1 Release 9.1 Notes 08/23/2007

Version 1 Release 9 Notes 08/03/2007

Version 1 Release 8 Notes 03/22/2007

Version 1 Release 7 Notes 12/29/2006

Version 1 Release 6 Notes 09/26/2006

Version 1 Release 5 Notes 07/07/2006

Version 1 Release 4 Notes 03/17/2006

Version 1 Release 3 Notes 02/22/2006

Version 1 Release 2 Notes 01/18/2006

Version 1 Release 1 Notes 11/18/2005

Installing a New Version

Notification about the availability of a new version Docu-MART Authoring Tool comes by two methods--viewing a message at the time of logging in to the application, or by selecting About Docu-MART from the Help main menu. Regardless, the process for installing an updated version is the same.

Most frequently, information about an available update comes from receiving one of the following messages:

Warning message

There are newer versions of Authoring Tool available for downloading. Update your Authoring Tool from the About Docu-MART menu.

Error message

There are newer versions of Authoring Tool available for downloading. You MUST update your Authoring Tool from the About Docu-MART menu.

1. After reading either version update message displays, Warning or Error, click **OK**.

2. From the Help main menu item, select **About Docu-MART**.

3. Click the **Check for Update** button.

   If there is an available updated, the 'New Update Available' message displays and the Check for Update button is replaced by the Install Update button.

4. Click **Install Update**. A message displays indicating that any running Authoring Tool applications must be closed before the updates can occur. If there are any applications, close them.

5. Click **OK**. The Docu-MART Authoring Tool Downloads screen displays.

6. Click **Run Setup**.

7. Follow the instructions that appear on the Installation wizards that automatically appear.

Note: A security warning window appears asking for confirmation that the update should be installed since it is deemed authentic. Click **Yes** or **Always** to proceed with installing the update. Selecting Always prevents further display of this warning window.

Menus and Navigation

The menu items and navigational tools are particularly important in the Docu-MART's Authoring Tool editor. Proper use of these functions assists in creating, editing, and managing each document version. Divided by heading, the menu items with their processing functions follow:

File

New	Opens the wizard and starts the authoring process for a new document. If a document

	is already opened, this new document opens in another window.
Open	Displays the 'Open a DXW file' window for selecting an existing document.
Close	Closes the current document.
Save	Saves contents of this editing session.
Save As	Opens the 'Save As' window; it allows you to save the document as the same version, new version of same document, or as a new document.
Save For Publish	Saves the document and prepares it for the Publishing process, after using optional preview functions.
Export	
Export to MS Word Document	Displays 'Save as' window; it allows you to export the file with a pre-selected file type of **.doc**
Export to HTML Document	Displays 'Save as' window; it allows you to export the file with a pre-selected file type of **.html**
Export to PDF Document	Displays 'Save as' window; it allows you to export the file with a pre-selected file type of **.pdf**
Page Preview	Displays a view-only layout of the document as it will print.
Print	Displays the default printer selection and related information. The selection can be changed.
Printer Settings	Displays the Printer Setup window, where printer properties can be changed.
Recent Files	Lists up to 20 of the last successfully opened or saved DXW files, for easy selection.
Exit	Closes the application.

A related application download might be required for PDF, Word, or DXW files.

Edit Data

Title Page	Displays the Document Title wizards that allow title page editing.
Document	
Agents	Displays concept- or protocol-specific Agents

	wizard.
Diseases	Displays concept- or protocol-specific Diseases wizard.
Therapies	Displays concept- or protocol-specific Therapies wizard.
Embedded Non Laboratory Correlative Studies	Displays concept- or protocol-specific Embedded Non- Laboratory Correlative Studies wizard.
Embedded Laboratory Correlative Studies	Displays concept- or protocol-specific Embedded Laboratory Correlative Studies wizard.
Accrual Targets	Displays concept- or protocol-specific Accrual Targets wizard.
Person Completing	Displays concept-specific Person Completing wizard.
PSW (for protocols only)	Displays the PSW wizards that allow PSW editing.

Section

Hint	Displays suggestions and definitions related to the current document.
Rename	Lets you rename a heading if it is a user-defined section or a conditional section from a template. .
Move	After selecting a section to be moved, this menu item is enabled when appropriate. it is used in conjunction with Move Here.
Move Here	After a section has been selected to be moved, place the cursor where you want the text to be and click this menu item.
Insert from Template	Displays a list of top-level sections available for insertion from the template version of the current document.
Insert Before	Inserts a same-level heading and blank text area immediately before the selected section.
Insert After	Inserts a same-level heading and blank text area immediately after the selected section.
Inset Subsection	Inserts a subordinate (subsection or child) heading and blank text area for the selected parent section.

Remove	Removes the selected sections and (possible) subsections; automatically renumbers sections.

Tools

Check Completeness	This option is used almost as a checklist, to let you know which required data elements are finished. Selecting this menu item automatically displays a list with all of the required data elements. Those that are featured with a checkmark are finished, the others are not. Clicking on the Show Pending button lists only those that are not finished.
View PSW (for protocols only)	Generates a PSW based on current data and displays the PSW via .pdf reader. It then can be edited.
View Comments Reports	Links to Review and Commenting - Previous Reports page.
Create Change Memo	Facilitates the creation of a Change Memo if there is a previous version available as a basis.
Publish	Starts Publishing process by initializing pre-publishing, which offers 3 options: **Preview PDF Version**, **Preview HTML Version**, **Check Completeness**.

Help

Contents	Displays the online help Welcome screen, with the table of contents to the left.
Creating a Document	Displays online help containing details about creating a Docu-MART authored document.
Editing a Document	Displays online help containing details about editing an existing Docu-MART authored document.
Publishing a Document	Displays online help containing information about publishing the document after it is authored.
About Docu-MART	Shows identifying information about the Docu-MART Authoring Tool, such as current version, release, and so on. Additional

	functions include a link to the CTEP web site and a button to check for updates of the application.

Starting the Document Creation Process

The key steps to creating a Docu-MART document are using and understanding the three wizards that guide you through the creation process (Selection Wizards, Title Page Wizards, and for protocols only, PSW Wizards), as well as performing basic editing skills on the body of the document.

> ***Note:*** Each Wizard includes its own help text. The relevant help text is accessed from the Help button featured on that particular screen.

To begin the process to create a Docu-MART authored document:

1. Select **New** from the File main menu item.
2. Enter your User Name and Password, then click **Login**.
3. Select your organization from the drop-down list, then click **OK.** The first Selection Wizard (Document Type) displays.

3. Proceed through the automatic Selection Wizards, clicking the Help button when necessary.

5. When you are finished, click **Generate**.
6. The Docu-MART Generating New Document window displays, with a progress bar indicating that the document generation is in progress.

   The document then displays, containing text and section headings abstracted from your organization’s template. The screen is divided into two logical section—on the left is the tree structure for the document, on the right is the actual text, with headers and sections.

Note: The Joint Commission on Accreditation of Healthcare Organizations maintains a list of misleading or unacceptable terms to be avoided in medical documentation. This 'Do Not Use' list can be referenced by clicking on this link: Do Not Use List

Creating a Document

The contents and structure of your document that displays in Docu-MART's authoring tool editor is based on the selected template for your organization.

The contents of your template determines the scope and sequence of the headings and related text that becomes the basis of your changes and additions. In other words, you use this editor to make appropriate and organized changes and additions to the text, as featured in the template.

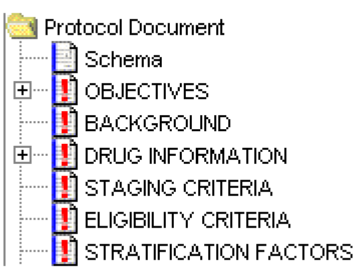
Any changes and additions that you make are specific to this document version, you will not affect the template or any other document versions.

Progressing through the authoring tool and the editor depends on five major areas of knowledge:

- The actual steps in starting the initial document.
- Using and understanding the menu and navigational tools.
- Understanding the heading and section hierarchy.
- Locating and accessing the appropriate section.
- Making changes, deletions, and additions based on the template contents.

Understanding the hierarchy (tree structure)

Tree structure example (actual contents may vary):



The sections of the document display in a tree structure, that is, they appear in order and list the subheadings if the listing is expanded. If there are subheadings within the heading, a key icon with a plus (+) sign inside appears to the left of the heading name. Clicking on that plus sign displays the subheading names and the key icon becomes horizontal. Clicking that key icon collapses listing and displays only the heading.

Important information about the tree structure:

- Clicking on the actual heading text within the tree structure automatically transfer you to that section in the document.
- You can add sections to your document and it will automatically renumber and reposition the document text.
- You can move sections, both before and after selected text. You also can insert a subsection (child section) to a section (parent section), although it defaults to adding a parallel section, such as section/section and subsection/subsection.
- The Document icon immediately to the left of the section text in the tree structure indicates what type of section it is. A blue and red document icon indicates that it is a required section and cannot be removed. A blue document icon indicates that it is an optional section that came from the template. If a section is added after the document was generated, the icon is completely white.

Accessing a section

To access a specific section, click the appropriate heading in the tree structure, or scroll through the document until you reach the section that you want. Editing then is performed in the traditional manner of most editing software.

Making changes, deletions, moves, and additions

If the file to be changed is not currently open, selected Open from the File main menu. When the Open A DXW File window displays, select the appropriate file.

To make changes:

1. Click on the appropriate section header or scroll to the actual text, then change the existing text.
2. Continue accessing sections and making any necessary changes. At this time Docu-MART is performing chiefly as a standard word processor.

To delete a section:

You can only delete sections that are not required (optional or user-defined) sections:

1. Select the text to be deleted.
2. Select **Remove** from the Section main menu.

Note**:** You must first remove any mandatory, conditional subsections before you can delete an optional section that is conditional. To do this, navigate to the appropriate wizard and make the condition invalid so that the mandatory, conditional subsection is automatically deleted. Refer to the Hints to determine the conditional sections for each template.

To move a section:

1. Select the section to be moved.
2. Select Move from the Section main menu.
3. Move the cursor to the place in the document text where you want the selected text to be moved, then click **Move Here** from the Section main menu.

To add a section and text:

1. *If you want to add an equivalent section*, such as adding a parent section with another parent section, select an insertion point on the document, then click **Insert Before** or **Insert After** from the Section main menu (depending on where you want the new section to go.)
2. An Insert Section window displays. Type the new section title in the entry box, then click **OK**.
3. A status action bar displays as the system automatically updates and renumbers the document headings.
4. Begin typing your document text in the blank row beside the new heading.

To add a subsection to a section heading:

1. Click **Insert Subsection** from the Section main menu. An Insert Section window displays.
2. Type the new subsection title in the entry box, then click **OK**.

3. A status action bar displays as the system automatically updates and renumbers the document headings.

4. Begin typing your document text in the blank row beside the new heading.

Note**:** You cannot create more than six section levels. Beyond this, your options are to add subsections at the same level (that is, at level six) or add them as bulleted text.

Editing a Document

Understanding and using the editing process for an existing Docu-MART authored document involves four major concepts:

- Knowing how to open the appropriate document
- Understanding the steps for creating a document
- Knowing the authoring tools menu and navigation tools.
- Determining if you want to overwrite the existing (current) version with the newly edited version.

The Version Control Alert window displays, allowing you to:

- Click **Yes** to overwrite the current (existing) version by saving your editing changes
- Click **No** to cancel the save and retain the information in the current version.

To eliminate the occurrence of this Version Control Alert window, click the checkbox to the left of 'Don't ask me this again' notation. This confirmation window will no longer display after **Save** is selected, and the overwriting will be automatic.

Publishing a Document

The Publishing function is used to upload the document for further processing. This action should be performed only after all reviews and edits are complete.

Since this is the final Authoring Tool process, a selection and confirmation message displays that provides 'final check' mechanisms as well as a continue function.

Steps

1. Select **Publish** from the Tools main menu.

   A selection and confirmation message displays, with five button options, Preview PDF Version, Preview HTML Version, Check Completeness, Continue, and Cancel.

Preview PDF Version

1. Click to display a PDF version of the document for review. If changes need to be made:

   - Close the preview
   - Make the changes
   - Save the document
   - Select **Publish** from the Tools main menu again and continue.

Preview HTML Version

1. Click to display an HTML version of the document for review. If changes need to be made:

   - Close the preview
   - Make the changes
   - Save the document
   - Select **Publish** from the Tools main menu again and continue.

Check Completeness

1. Click to display the Document Completeness Checklist for review. 'Unchecked' items are not complete.

   - Close the checklist
   - Complete the necessary information.
   - Save the document
   - Select **Publish** from the Tools main menu again and continue.

Continue

1. Click Continue when the Save Confirmation message displays. This signifies that the document is finished and correct.

   a. The contents of this document is saved, overwriting any previously saved information.

b. There will be a brief wait as the document uploads. A confirmation message displays when the upload has finished.

Cancel

1. Click **Cancel** to return to the document without performing any publishing activities. Any unsaved changes will need to be saved.

Important Note: Site Coordinators have the option of assigning reviewers to the document immediately after the upload has finished. Click Continue to proceed to the Assign Reviewers screen or click Cancel to defer assigning reviewers.

Tip of the Day Archives

The Docu-MART Authoring Tool offers a 'Tip of the Day' for the users as they log into the application. These tips are brief, timely suggestions or recommendations designed to offer assistance in making optimum use of the Authoring Tool.

As these tips are developed, each one will be added to this Tip of the Day archived so that the information can be referenced at any time.

Bullets and Numbering

Inserting Images in Documents

Do Not Use Undo

Resizing Open Office to View Complete Menu

Application Downloads

For DXW application requirements or information, contact: ncictephelp@ctep.nci.nih.gov.

For PDF application requirements or information, contact: http://www.adobe.com/ and select Downloads.

For MS Word application requirements or information, contact: http://www.microsoft.com/.

AutoCorrect/AutoText

Using AutoCorrect

AutoCorrect not only lets you correct commonly misspelled words automatically, it is also used to create typing shortcuts.

To create an AutoCorrect entry:

1. Select **Tools --> AutoCorrect/AutoFormat**.

2. Click the **Replace tab**. Two columns display, Replace and With, that include a long list of existing entries. Before adding an entry, check that it does not already exist.

3. To add an entry, enter the spelling/text to replace in the **Replace** text box.

4. Enter the correct spelling in the **With** text box.

   Repeat Steps 2 – 4 to add another entry.

5. Click **OK** to close the dialog box.

Note: As you type, OpenOffice.org automatically corrects incorrectly spelled items when the spacebar is pressed after the word or after a period.

Using AutoText

AutoText is another way to create shortcuts to frequently used text and formats. Another great advantage of AutoText is that it can be used to insert graphics, tables, and other objects.

To create AutoText:

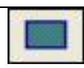
1. Type the full version of the text and select it in the document.
2. Select **Edit --> AutoText**.
3. In the **Name** text box, enter a name for the shortcut.
4. In the **Shortcut** text box, enter your shortcut. *Hint*: Keep the name short.
5. Select **AutoText --> New** or **AutoText --> New (text only)**. Use the Text Only option to ignore any selected graphics.
6. Click the **Close** button to return to your document.
7. Type the shortcut name and press **F3** to insert the AutoText in your document.

Creating Drawing Objects

The OpenOffice Draw Function allows you to create simple diagrams such as schemas and flowcharts using rectangles, circles, lines, text, and other objects.

To display the Draw Functions toolbar, long-click the **Show Draw Functions** icon  on the Main toolbar on the left of the screen.

Descriptions of some of the Draw objects that can be used to create a schema or flowchart follow.

Click	To Draw…
	A straight line or arrow in the current document. To constrain the line to 45 degrees, hold down **Shift** while you drag. To enter text on a line, double-click the line and type or paste your text. The text direction corresponds to the direction you dragged to draw the line. To hide the line, select **Invisible** in the **Line Style** box on the **Object** bar.
	A rectangle in the current document. To draw a square, hold down **Shift** while you drag. Click where you want to place a corner of the rectangle, and drag to the size you want. You can resize a rectangle by dragging one of the handles of the rectangle.
	An oval in the current document. Click where you want to draw the oval, and drag to the size you want. To draw a circle, hold down Shift while you drag.
	A Text box with horizontal text direction in the current document. Drag a text box to the size you want anywhere in the document, and then type or paste your text.

Tip: **When creating a diagram using the Draw Function, use text boxes for all text. You will not be able to Group objects if you combine plain text with objects.**

Find and Replace

The Find and Replace feature provides ways to search and locate words or phrases in the document (for example, an agent's name) and change it in multiple locations automatically.

Find & Replace Text

1. Choose **Edit --> Find & Replace** or press **Ctrl+F** to open the Find & Replace dialog window.

2. To find text, enter that text in the 'Search for' list box. Click **Find** to find the next instance of the text or click **Find All** to select all instances of the text.

3. To replace text, enter the new text in the 'Replace with' list box. Click **Find**, **Replace**, or **Replace All** (not recommended without complete certainty).

Tip: To fine tune the search using wildcards and regular expressions, click the **Help** button in the Find & Replace dialog box and look for the List of Regular Expressions.

Find and Replace Specific Formatting

1. Choose **Edit --> Find & Replace** or press **Ctrl+F** to open the Find & Replace dialog window.

2. To search for text with specific formatting, enter the text in the 'Search for' box. To search for specific formatting only, delete any text in the 'Search for' box.

3. Click **Format**, and then choose from the list the formats for searching. The names of the selected formats appear under the Search for box.

- **To replace text**, enter the replacement text in the 'Replace with' box.
- **To keep the same text but change the formatting**, enter the same text in the 'Replace with' box.
- **To change formatting only, delete any text in the** 'Replace with' box. Click **Format** and choose the appropriate formats.

- **To remove specific character formatting**, click **Format**, select Font, then select the opposite format (for example, No Bold). The No Format button on the dialog clears all previously selected formats.

4. Click **Find**, **Replace**, or **Replace All** (whichever is appropriate).

Note: Unless there are plans to search for other text using those same attributes, click **No Format** to remove the attributes. Otherwise, a future search might fail to find existing words in the document.

Grouping Drawing Objects

If you create a schema or flowchart using the Draw functions, it is strongly suggested that you group the drawing objects to make sure they maintain alignment. This is especially important when converting the document to HTML format when it is published for review.

To group drawing objects:

1. Select the objects in the drawing.

   To select more than one object, select one object, hold down the **Shift** key drag and select the others that you want to include in the group. A selection frame expands to include all the objects.

   To add an object to a selection, press **Shift**, then click the object.

2. With the objects selected, click **Format --> Group --> Group** or right-click and select **Group --> Group** on the pop-up menu.

   This will group the multiple objects in the drawing so that it can be moved as a single object and maintain its formatting in HTML.

3. Select **Save for Publish** from the Authoring Tool **File** menu to preview drawing in HTML before publishing for review.

Inserting an Image from Another File

Images should be inserted as separate files. Image files are those with a file type extension such as gif, jpg, or bmp. Other types of image files should be converted, if possible, into these types of files before insertion.

Insert Graphic

1. Place your cursor in the section of the document where you want to insert the graphic/image.
2. From the Open Office (OOo) menu bar in the Authoring Tool, choose **Insert > Picture > From File**.
3. Select the file from the location where it was saved.
4. Click **Open** and the graphic/image will be inserted in the document.

Insert OLE Object

Use the OLE Object feature to insert images/objects that cannot be converted into one of the recommended graphic file types.

1. Place your cursor in the section of the document where you want to insert the object/image.
2. From the OOo menu bar in the Authoring Tool, choose **Insert > Object > OLE Object**.
3. Select **Create From File**.
4. Click **Search** to locate the file or enter the name of the file that you want to link or embed.
5. Click **Open** and the object/image will be inserted in the document.

Note: Avoid using the 'Paste Special' feature from Open Office when the copied content contains images. Inserting images using 'Paste Special' feature slows the publishing process, and could cause Open Office to crash.

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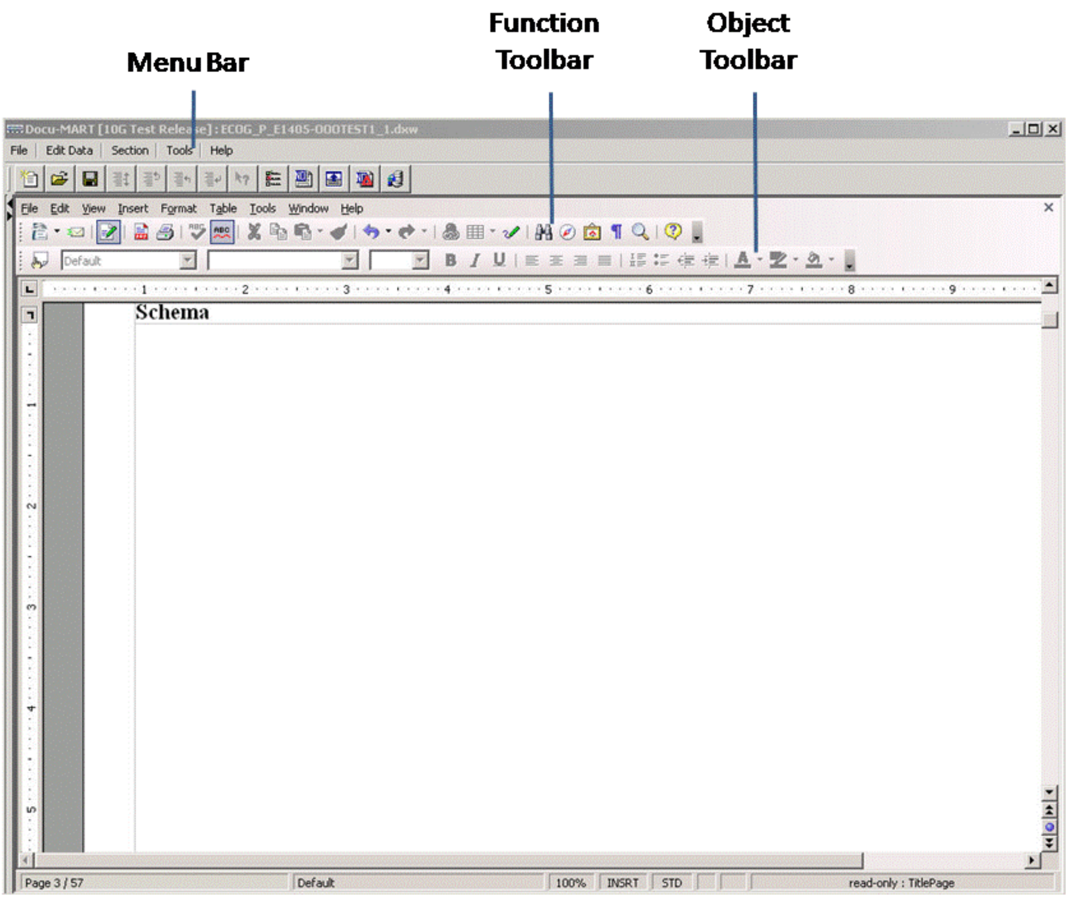

OpenOffice Overview

OpenOffice is a multi-platform and multi-lingual office suite and an open-source project. A major reason that it was chosen to be Docu-MART's word processing function is that it is compatible with all other major office suites.

Much of OpenOffice is virtually transparent to the users since it is designed to work in conjunction with and as a part of Docu-MART. However, some consideration must be given to the writing functions provided by OpenOffice.

Click on the appropriate link to provided focused user assistance for OpenOffice formatting, numbering, and graphic capabilities:

[OpenOffice Writer Main Window]

[Setting Paper Size, Margins, and Orientation]

[Working with Styles]

OpenOffice Writer Main Window

OpenOffice Writer has two main toolbars:

- Function toolbar - This toolbar contains basic commands that apply to most types of tasks. You can find the toolbar at the top of the OpenOffice.org application window.

- Object toolbar - The Object toolbar changes depending on the type of objects that you have in your document or have selected. In general, the Object toolbar has tools for formatting objects.

Outline Numbering Style

It is recommended that you avoid using the **Numbering On/Off** and **Bullets On/Off** toolbar buttons in Open Office to apply bullets or numbering to text.

If you want to insert an outline-numbered list like the one below that will update automatically if the parent section numbering changes, copy text that is a part of the template that already has the outline numbering style.

2.1 Level 1 List Item
2.1.1 Level 2 List Item
2.1.1.1 Level 3 List Item

Follow these steps to apply outline numbering style to section text:

1. Copy a list in the document template that already has the outline numbering style (i.e., 2.1 or 2.1.1, etc.). Hint: *You do not need to copy the entire list, just the first 2 – 3 items.*
2. Paste the list in the document section of choice.

   The outline numbering will begin with the relevant section number. For example, if you copy a list from section 7 and paste it into section 3, all of the outline numbering will begin with 3 (i.e. 3.1.1, 3.1.2, etc.).
3. Edit the list as necessary.

Tip *Use shortcuts to move paragraphs up or down the outline levels. Place the cursor at the beginning of the numbered paragraph and right-click to display the shortcut menu or press:*

Tab	**Move *down* a level**
Shift Tab	**Move *up* a level**
Ctrl+Tab	**Insert a tab stop after the number**

Note**:** If you insert a list with an outline-numbering style that was not copied from the template, the numbering will not update automatically if the section number changes.

Note**:** In some cases, applying the outline-numbering style to a parent section causes the subsections to renumber incorrectly. If this occurs, follow the steps below to correct the subsections' numbering:

1. Select the text with the outline-numbering style and click the **Format** > **Bullets and Numbering** menu. *(You can also right-click and select Numbering/Bullets from the shortcut menu.)*
2. Click the **Remove** button to remove the outline-numbering style.
3. From the **Format** menu select **Bullets and Numbering** to add the bullets/numbering style back.

Setting Paper Size, Margins, and Orientation

To define the setup and layout of the pages in the document, such as page orientation (landscape vs. portrait), margins, and page numbering, use the **Page Style** dialog box.

1. Place the cursor anywhere on the page except in the section headings.
2. Choose **Format --> Page --> Page tab**.
3. Specify the settings for the Page and click **OK**.

Tip *Unlike Word, the Page Style in OpenOffice is a property of the page and not the document as a whole. If you change the page layout for one page style, only that style will be affected. You can specify which page style applies to the next page. For example, you could specify a Portrait page style followed by a Landscape style.*

Tables

Tables can be used to present data, line up material that otherwise use tabs and hanging indents, or line up text or graphics in the margin with specific paragraphs (such as checklists).

Create Table

1. Choose **Insert** --> **Table**.
2. In the Insert Table dialog, set the number of columns and rows.
3. In the Options section, set the basic options such as header and borders.
4. Click **OK**.

Line Up Text/Graphics in Margin

Example of graphic aligned with text using a table:

________	3.1.1. Patient Eligibility Criteria 1
________	3.1.2. Patient Eligibility Criteria 2
________	3.1.3. Patient Eligibility Criteria 3

1. Place the cursor where you want the table to appear and click **Insert --> Table**.
2. In the Insert Table dialog, define a two-column table with no border and no header. Click **OK**.

3. With the cursor in the table, click **Format --> Table** (or right-click and choose Table form the pop-up menu). On the Columns tab, make the columns the required width.

4. On the Table tab, in the Spacing section, make the Above and Below values the same as the Top and Bottom spacing that were defined for ordinary paragraphs of text. Click **OK**.

Note: If this table format is used often, it might be beneficial to save it as AutoText (described in AutoCorrect/AutoText).

Correcting Automatically

AutoCorrect not only lets you correct commonly misspelled words automatically. You can also use AutoCorrect to create typing shortcuts.

To create an AutoCorrect entry:

1. Choose **Tools --> AutoCorrect/AutoFormat**.

2. Click the **Replace** tab.

3. Two columns, Replace and With, display with a long list of existing entries. Before adding an entry, check that it does not already exist.

4. To add an entry, enter the spelling/text for replacement in the Replace text box.

5. Enter the correct spelling/text in the With text box.

6. Click the **New** button.
   Repeat Steps 3 – 6 to add another entry.

7. Click **OK** to close the dialog box.

Note: As typing occurs, OpenOffice.org automatically corrects incorrectly spelled items when the spacebar is pressed after the word or add a period.

Working with Styles

Styles are a set of formats that you can apply to selected pages, paragraphs, frames, and other elements in your document to change their appearance quickly. When you apply a style, you apply a whole group of formats at the same time (font, text size and alignment, bullets, etc.).

Creating a Style by Example

To create a style using text that has the desired format, follow these steps:

1. Open the **Stylist** panel **(press F11)**.
2. Click the type of style that you want to create.
3. The icons for the style types are along the top of the Stylist panel. For example, to create a paragraph style, click the Paragraph icon.
4. Click in the text that you formatted or select one character or object that has the format you want.
5. If you clicked in the text, click the **New Style from Selection** button in the Stylist panel. If you selected text or an object, drag the text or object into the Stylist panel. The **Create Style** dialog box then opens.
6. Type a name in the **Style Name** text box.
7. Click **OK**.

You can now use this style for other text.

Modify an Existing Style

You can modify an existing style, and all text using that style will automatically be updated. To modify an existing style:

1. Choose **Format > Styles > Catalog**.
   The **Styles Catalog** dialog box opens.
2. Choose the style that you want to modify.
3. Click the **Modify** button.

   The dialog box that opens depends on the type of style that you chose and the style's name. Each dialog box has the settings that you need for that type of style.
4. Go through the tabs and change any settings that you want.
5. Click **OK** to change the style.

6. Click the **Close** button to close the **Styles Catalog** dialog box and return to your document.

Creating a Change Memo

The Create Change Memo option is used to create a Change Memo for a specific document version. This Change Memo is similar to a checklist or comparison document that contains changes or proposed changes to the version.

Steps

1. Select Create Change Memo from the Tools menu or click on the icon.

   Important Note: If there is a Change memo currently associated with the version, the Edit/Regenerate selection box displays, click **Edit**. Click **Regenerate** to create a new one that will replace the existing Change Memo.

   The Create Change Memo window displays, with identifying information for the current document displayed at the top.

2. Click **Show All Versions** to see a list of possible document versions for selection. All document versions appear in the Document Versions list and the button is renamed to Show Latest CTEP Version.

   Note: Click **Show Latest CTEP Version** to display only the latest document version of 'CTEP Submissions'. The button name changes back to Show All Versions.

3. Click on the row containing the appropriate document version to create the new Change Memo.

   The first column contains the Local Version Number as well as the Submission status. The possible statuses include, but are not limited to:

- blank (only the version number is shown)
- Sign Off by CTEP
- Sign Off with Recommendations by CTEP
- Close Early
- Close Early, Sign Off by CTEP
- Close Early, Sign Off with Recommendations by CTEP

Note: The '# of comments' listed represents the number of comments **to be incorporated**.

4. Click **Create Change Memo**.

5. The New Change Memo window opens. This window's function can be compared to an attachment in an email. **Type directly into the text area** to make any changes, deletions, or additions.

6. Click **Save**, then close the window to return to the document associated with this Change Memo.

Editing a Change Memo

The Edit Change Memo option is used to edit an existing Change Memo.

Steps

The steps for editing a Change Memo depend on the specific edit function required.

Adding Sections:

1. Select a section in the tree structure on the left. Click on the Section menu item, then select your choice for inserting a section: Insert Before, Insert After, or Insert Subsection.

2. The Insert Section window displays. Enter the name of the new section. To have a section number associated with it, type that number also, that is, Possible Risks or 2.1 Possible Risks (examples).

3. Click **OK**.

   The new section name now appears in the tree structure.

4. Click on this new section name, then enter the appropriate text in the Change Memo text area. Repeat, if necessary, to add new sections.

5. Click **Save**.

Removing and Renaming Sections:

1. To remove a section, click on that section name in the tree structure, then select **Remove** from the Section main menu item.

2. To rename a section, click on that section name in the tree structure, then select **Rename** from the Section main menu item.

3. When the Rename Selected Section Box displays, enter the new section title. Click **Rename**.

Exporting Files:

1. Select **Export** from the File menu.

2. Select the appropriate output; MS Word Document, HTML Document, or PDF Document. Save the document when prompted.

Training Guides

Docu-MART (Document - Management Authoring Review and Tracking System) currently has the following five training guides:

- Authoring Tool Training Guide
- Protocol Specialist Training Guide
- Publish Training Guide
- Review and Comment Training Guide
- Scientific Library Training Guide

If you encounter problems working with Docu-MART, please contact the NCI CTEP Help Desk for a quick resolution.

To contact the NCI CTEP Help Desk:

- Email at ncictephelp@ctep.nci.nih.gov.